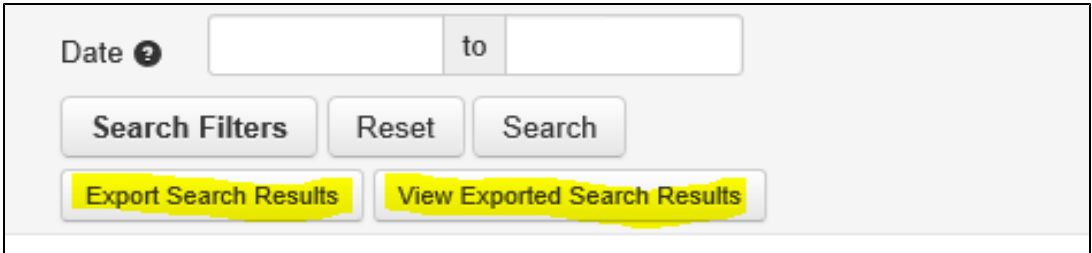
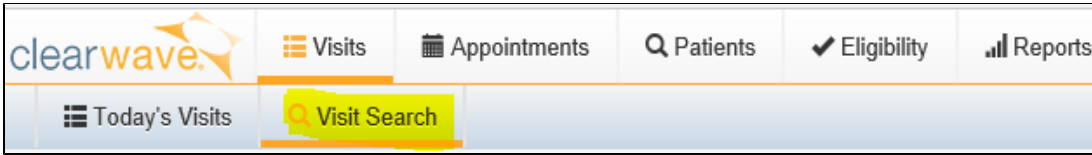
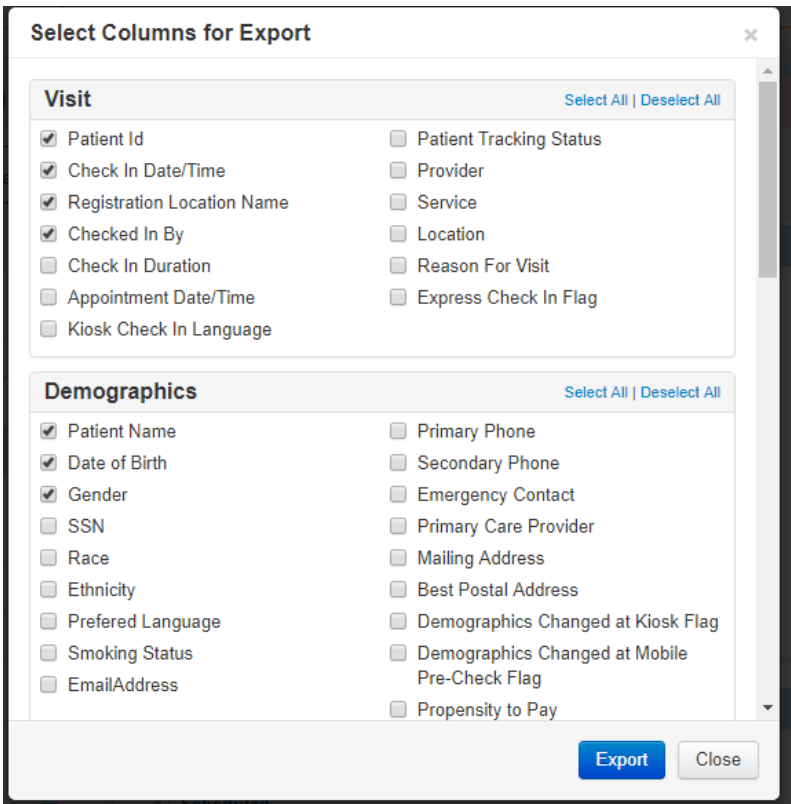


Exporting Visits Report

On the **Visit Search** tab, there is an option to "export search results" and "view exported search results." This could be used for looking at specific visit details for a location or individual patient, for looking at demographics, or for looking at insurance information.



Clicking on "export search results" will bring up a mini window where you can select or deselect the qualifications you need a report for.



Select Columns for Export ✕

Custom Fields Select All | Deselect All

Andrew Email Consent 1
 dfindn TEST FT
 Referral source PatientLinkTest
 Test

Insurance Select All | Deselect All

Submitted **Eligibility**
 Payer Eligibility Status
 Member ID Eligibility Code
 Relationship To Subscriber Transaction Date/Time
 Group Number Effective/Term Date
Subscriber
 Subscriber Name Copay
 Subscriber Date of Birth Coinsurance
 Subscriber Gender Deductible
 Subscriber SSN Out Of Pocket

Payment Select All | Deselect All

Export **Close**

Select Columns for Export ✕

Subscriber Name Coinsurance
 Subscriber Date of Birth Deductible
 Subscriber Gender Out Of Pocket
 Subscriber SSN

Payment Select All | Deselect All

Payment Status Copay Due
 Swipe And Hold Status Outstanding Balance Due
 Total Amount Paid Balance Due For Visit
 Total Amount Due Self Pay Service Fee Due

Export Options

File Output Type: Tab Delimited Text File (recommended) ▾

Description:

Add a Description with details or hints about the export.

File Name:

Specify a File Name to override the system generated name. The system will append "_###.txt" or "_###.xlsx" to the entered name where "###" is a sequential number.

Export **Close**

After you've made the selections for the report, selecting "export" will bring up a new window. Clicking on the file name (as seen highlighted below) will download the file to the computer where you can open it to view the results.

Visit and Appointment Export Files

To generate a new Visit Export File, first [search](#) for visits and then click the Export Search Results button.


To generate a new Appointment Export File, first [search](#) for appointments and then click the Export Search Results button.

Visit and Appointment Export Files are either text files containing tab-separated values or Excel XLSX files. Text files can be opened with a tool such as Microsoft Excel. Excel XLSX files can be opened with Microsoft Excel version 2007 or later.

Important: Files may be deleted after 48 hours.

Queued DateTime	Description	Status	Elapsed Time (hh:mm:ss)	Rows	File Size	File
03/08/2016 10:08 AM (EST)		Finished	00:00:01	20	3.74 KB	ExportVisitsToFile_326001.txt

If there is a need to view all the reports that have been exported, click on the button that says "view exported search results" and it will take you to another page (seen above) where the exported reports will be listed and you can select one to open.

Date  to

[Search Filters](#) [Reset](#) [Search](#)

[Export Search Results](#) [View Exported Search Results](#)